



MEMBERSHIP APPLICATION 2021

1. Save this form to your computer and complete it electronically
2. E-mail form to forms@communityshares.org with "Membership Application" in the subject line
3. Collect documents listed on the checklist and complete the form;
4. Print and sign Membership Agreement (Executive Director & Board President/Chairperson must sign)
5. Email your checklist, signed Membership Agreement and other documents to: forms@communityshares.org

**ALL APPLICATIONS MUST BE SUBMITTED BY 5:00 PM ON FRIDAY, APRIL 9, 2021
PLEASE SEE CHECKLIST ON PAGE 6 FOR SUBMISSION INSTRUCTIONS**

Organizational Information

General

Name of Organization: _____

Federal EIN: _____

Date of Non-Profit Incorporation _____

Number of Years in Operation: _____

(Member applicants must have been in operation at least two years prior to joining.)

Mission Statement:

Website URL: _____

Phone Number: _____

Fax Number: _____

Mailing Address: _____

We use a P.O. box as our mailing address Yes No

Are you a membership organization? Yes No

If yes, how many members: _____

Member type: Organizations Individuals

Are you a fiscal agent for any projects, unincorporated groups, or individuals? Yes No

If yes, please list.

Executive Director/ Chief Executive

Name: _____ Phone: _____
E-mail Address: _____

Person Completing Form (if different from above)

Name: _____ Phone: _____
Title: _____
E-mail Address: _____

Board Information

Board Chair or President Name: _____ Phone: _____
E-mail Address: _____

Other Information

Fiscal Year Ends: _____
Total Amount of FY2020 Board Approved Expense Budget: _____
Total Amount of FY2021 Board Approved Expense Budget, if available: _____
Number of Paid Full Time Employees: _____
Number of Paid Part Time Employees: _____

(Note: you must have a minimum of a 1/2 time employee paid by the organization to be a Shares member.)

Number of Volunteers (Regular, Per Year) _____
Number of Volunteers (Occasional Per Year) _____
Approximate Number of Volunteer Hours/Units Per Month _____
Approximate Number of Volunteer Hours/Units Per Year _____

Office Hours (days and times):

(Shares members are required to have a dedicated office space and phone line and keep scheduled office hours.)

Questionnaire

What are the goals of your organization?

What are the programs and/or activities of your organization?

What elements of your mission, goals, programs and/or activities specifically relate to social justice?

Please give examples of ways your organization has worked in the last two years to bring about (long-term) social change, such as addressing the social, economic, cultural or political barriers that keep people from fully participating in society.

Why do you want to be a member of Community Shares?

What geographic area does your organization primarily serve? (i.e. neighborhoods, counties)

What population group(s) does your organization primarily serve or benefit?

What workplaces would you be able to recruit to start a Community Shares campaign? (Note: You will be required to solicit at least two new campaigns per year as a member.)

Give examples of your organization's interactions or collaborations with other organizations in your community, including any Community Shares members.

What kinds of challenges does your organization face in achieving its goals?

Are you a member of a United Way or other workplace giving federation? Yes No

If yes, please describe and provide amount provided to your organization last year:

Please circle the priority of each of the following as it aligns with your organization's programs. (Scale of 1 being do not focus on it to 5 being the highest focus of your organization's programs):

| | | | | | |
|-----------------------------|---|---|---|---|---|
| Advocacy | 1 | 2 | 3 | 4 | 5 |
| Policy | 1 | 2 | 3 | 4 | 5 |
| Education | 1 | 2 | 3 | 4 | 5 |
| Direct Service | 1 | 2 | 3 | 4 | 5 |
| Social Change | 1 | 2 | 3 | 4 | 5 |
| Community Organizing/Action | 1 | 2 | 3 | 4 | 5 |

Please give dates and times of your board meetings between March and May 2021 during which representatives can meet with them. This year we are only participating in virtual (Zoom) meetings.

Affirmations

1. **We have read and understand the accompanying Membership Policies & Procedures document which outlines membership criteria, dues and participation requirements.**

Yes No For questions contact Cynthia Ries by email at cynthia@communityshares.org

2. Applicants must provide a board resolution (a written statement created by the organization's board of directors documenting a decision) approving this application to Community Shares. **We have prepared a board resolution and will attach it to the this membership application.**

Yes No

If you are not able to attach a board resolution, please explain why and when it might be expected:

3. **We understand that Shares members pay annual dues.** NOTE: Currently, dues for new members are based on your organizational expenses from the previous year and may be as much as \$2,500 the first year. Every year thereafter, member dues are based on campaign revenues, according to a sliding scale.

Yes No

4. Member organizations are required to fulfill an annual 50-point work commitment to Community Shares. **We are willing to assign a staff member(s) the responsibility of seeing that your commitment is fulfilled.**

Yes No

5. **We understand that we are required as a member to solicit at least two new campaign worksites each year.**

Yes No



CHECKLIST – PLEASE PRINT THIS PAGE AND SUBMIT

After e-mailing your application, please email, mail (mailed material must be **received** by the due date) or deliver the signed original of each of the following to Community Shares. **Your Application is not considered complete unless ALL ITEMS BELOW are included and your 2021 Membership Agreement is signed by both parties. PARTIAL APPLICATIONS WILL NOT BE REVIEWED.**

Attach electronically or mail so that it is received by the due date:

- Organization’s 501(c)(3) status notification letter from the IRS “IRS Letter of Determination” 2016 or later
- Copy of completed *Verification of Registration with the State of Ohio Attorney General’s Office* Online Form (www.ohioattorneygeneral.gov/NonprofitRegistrationVerification)
- State of Ohio Certificate of Continued Existence Form (*obtained from Secretary of State*)
- List of Board of Directors with term of office and affiliations
- Most recent IRS form 990 (**signed in blue ink by the chief officer of organization**)
- Most recent Audited Financial Statement or Independent Financial Review (revenues over \$100,000) **OR** for revenues below Profit & Loss Statement and Balance Sheet for year-end (corresponding to IRS Form 990)
- Current Board- approved operating budget and corresponding statement of income and expenses 2020 and 2021 if applicable
- Board resolution approving application to Community Shares (if not available at the time of the application, you must be able to provide this before May 2021).
- Non-Discrimination Policy
- Most recent Annual Report, and any collateral materials you would like to include that stated the direct health and human service benefits you are providing.
- Code of Regulations (By-laws)
- Strategic Plan, Brochure or any other collateral (can be mailed separately)

EMAIL by **Friday, April 9, 2021 at 5 pm** to: forms@communityshares.org The **COMPLETED** Application Form

- **ONE COPY** of this checklist
- **ONE SIGNED COPY** of the Membership Agreement (Print next page and scan to email. Electronic signatures are not accepted.)

**PLEASE E-MAIL THE APPLICATION TO cynthia@communityshares.org
KEEP COPIES FOR YOUR OWN FILES.**

I have read the enclosed membership requirements as listed in the Membership Agreement and Shares Policies & Procedures document, and attest to the ability of this organization to fulfill them.

Organization _____

Executive Director’s Name _____

Date _____



2021 Membership Agreement

1. **Membership Criteria and Participation Requirements** must be maintained throughout the year by each member (See Policies and Procedures).
2. **Mergers or Strategic Alliances:** Members who are considering any kind of merger, strategic alliance, or change in their organization are required to contact the Shares Executive Director at the start of discussions, as per the Policies & Procedures and keep Shares informed of any status change.
3. **Annual Work Commitment:** each member shall assign a Shares member representative and contribute an annual minimum of 40 points. Distribution of undesignated pledges to Community Shares will be reduced to the extent members fail to achieve this minimum (See point value chart). Earning and keeping track of points is the responsibility of the member organization and NOT the staff of Community Shares.
4. **Worksite Campaigns:** each member agrees to actively participate in the Annual Campaign (i.e. make presentations, drop-offs/pickups) and assign a staff person to be campaign coordinator.
5. **Community Shares Identity:** all members will clearly identify themselves as members of Shares by including "Member of Community Shares" logo on letterhead, publications and printed and electronic materials. Members shall maintain a current website, have on it an active hyperlink to the Shares website, and provide Shares with a current brochure or fact sheet.
6. **Annual Dues and Financial Assessments:** members will pay annual dues and other financial assessments as decided by the Board of Directors. Invoices for annual member dues are mailed in the summer/fall and payable upon receipt. **Members with outstanding dues on August 1st may be excluded from the campaign brochure and subject to immediate membership suspension or termination.**
7. **Annual Member Information Update:** members shall sign and complete the Annual Member Information Update by the deadline and provide the necessary documents requested (see Membership Criteria).
8. **Financial Information:** members will provide evidence of an adequate system of accounting and financial management; this includes submitting signed financial information by deadline for State of Ohio CCC eligibility; members failing to comply will be excluded from the campaign (See Membership Criteria & Participation Requirements). **Members are required to enroll in combined campaigns via Community Shares and no other federations, as it takes from valuable operating revenue for Community Shares (See Membership Policies & Procedures).**
9. **Community Shares Campaign:** each member shall conduct a Community Shares campaign annually within its own organization or risk loss of their undesignated distributions. Each member is to provide two Access Committee leads to gain new workplace campaigns in the coming year and participate in recruiting and securing these campaign leads.

CERTIFICATION: We have read and understand the above requirements and standards for membership in Community Shares and confirm that our organization complies with the Membership Criteria and Participation Requirements. We understand that failure to maintain the above may result in membership suspension or removal, according to the Code of Regulations. We recognize that members of Community Shares are responsible for its health and well-being. We acknowledge that this responsibility includes keeping Community Shares' staff informed about any major changes in our organization. We also certify that, as of this date, our organization "does not knowingly employ individuals or contribute funds to entities or persons on either the U.S. Department of Treasury's Office of Foreign Assets Control Specially Designated nationals List or the Terrorist Exclusion List. Should any change in circumstances pertaining to this certification occur at any time, the organization will notify Community Shares immediately."

Organization Name

President's/Chairperson's Name

*President's/Chairperson's Signature

Date

Executive Director's Name

*Executive Director's Signature

Date